



**IN THE UNITED STATES PATENT AND TRADEMARK OFFICE**

In re application:      Bowler, et al.  
Serial No.:                09/768,407  
Filed:                      01/24/2001  
Group Art Unit:          3629  
Examiner:                 Fisher, Michael J.  
For:                        SYSTEM FOR FACILITATING ELEVATOR DESIGN

**DECLARATION UNDER 37 CFR 1.131**

I, Scott Gaskill, declare the following:

I am an inventor on this application with my co-inventors.

I thought of our invention prior to March 3, 2000. A copy of an invention disclosure form is attached to this Declaration that was completed within several months of March 3, 2000. My signature appears at the bottom of the page marked 6 in the attached copy.

On page 5 of the attached invention disclosure form, section 7.A indicates that we first thought of our invention prior to March 3, 2000. The section 7.B indicates that we had a completed, working system at least as early as within several months of March 3, 2000. That same section indicates that we had been testing such a system at least as early as within one month of March 3, 2000.

During the time period between March 2, 2000 and the date indicated as the "Date Completed" on the attached invention disclosure form, the individuals responsible for

completing the system we were working on at that time were diligently working on it until completion.

I declare that all statements made of my own knowledge are true and that all statements made on information and belief are believed to be true. I acknowledge that any willful false statements and the like are punishable by fine or imprisonment, or both (18 U.S.C. 1001) and may jeopardize the validity of the application or a patent issuing thereon.

  
\_\_\_\_\_  
Scott Gaskill

Dated: June 29, 2005

# OTIS INVENTION DISCLOSURE

(See Instructions)

OT-4798



1 TITLE: Plan your Project e\*Business Initiative

2. INVENTOR(S): (Print or Type)

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## 3(a) PROBLEM SOLVED

With Plan Your Project we have solved the problem of responding quickly to customers requirements for elevator planning, layout drawings, specifications and budget prices by providing a tool on the Internet. Plan Your Project provides a self-service solution to customers to plan and design an elevator project. Traditionally a customer would have to contact a sales associate to obtain this information. The advantages of this system over Otis' traditional delivery methods include:

1. **Speed** – The traditional method requires a knowledgeable sales associate to complete an OtisPlan analysis. The typical turnaround period would be days, if not weeks. Plan Your Project provides a way for customers to obtain solutions instantly and easily without extensive training.
2. **Accurate Drawings** – Traditionally an architect downloads standard drawings from a CD or web site. These drawings show a typical layout and are not dimensional. Plan Your Project generates a recommended solution and a dimensional layout drawing specific to the users requirements.
3. **Accurate Message** – Plan Your Project provides a consistent message to all users. It helps to eliminate the “guesswork” used by many sales associates. It also has been developed to meet local product and pricing conditions.
4. **Ease of Use** – Because Plan Your Project is an Internet application it is available 24 X 7. It also has the functionality to allow users the ability to contact Otis for sales assistance. Plan Your Project easily performs many of the functions that an architect or elevator sales associate would have to do manually today.

## OTIS INVENTION DISCLOSURE

-2-

3(b) **POTENTIAL BENEFITS** (Saves money, time, improved quality, expanded use, sales feature)

The potential benefits to Otis are increased customer satisfaction, sales leads and revenue. The benefit to the customer is that he/she can efficiently design and prepare bidding documents and budgets through a simple Internet user interface.

4. **DRAWINGS:**

Attachment 1 - Application Flow

Attachment 2 - Web Map

Attachment 3 - Functionality of the Administration Tool

Attachment 4 - Screen Captures - Plan Your Project

Attachment 5 - Screen Captures Administrator Tool

Attachment 6 - Screen Captures- Translation Tool

5. **DESCRIPTION OF INVENTION:**

**Plan Your Project** - is an Internet based tool used by architects on a 24 X 7 basis, to layout projects during a project design phase. This application performs four activities; optimization recommendation, specifications, layouts and budget pricing:

1. **Optimization/Recommendation** - Plan Your Project employs the same optimization algorithm as LiftPlan and OtisPlan. An architect has the ability to determine the proper elevator configuration for his/her project. There are three routes an architect can use to configure a solution: traffic analysis, hoistway fitting, and system search. Each of these routes helps the architect determine the best elevator solution for his/her project. The recommendations will include, but are limited to elevator size, type, and number of elevators.
2. **Specifications** - Based upon the information provided in Plan Your Project an Architect is able to generate, download and/or print job specific specifications.
3. **Layouts** - Based upon the information provided in Plan Your Project an architect is able view, print or download job specific dimensional layouts.
4. **Budget Pricing** - Based upon the information provided in Plan Your Project an architect is able to obtain online budget pricing for the project.

### **Traffic Analysis**

The Traffic Analysis function of Plan Your Project allows a user to input population and building characteristics that are used to determine minimal recommended solutions. The Traffic Analysis function utilizes Otis' traffic analysis algorithm to provide an elevator solution for a building based on the building type, number of floors and population. The user currently has five building classifications; office, car park, hotel, residential and other. Each of these options, with the exception of other, will generate recommended solution(s).

Traffic analysis in Plan Your Project is only available for single group, model product applications. More complicated applications requires OtisPlan. OtisPlan is an Intranet based product that requires training and has limited access.

In order to run a traffic analysis a user must complete a simple one page electronic form. This form has been set-up with default values to help guide the customer. Once the customer completes this electronic form then he/she will click on a "solve" icon to generate a recommended solution(s).

### **System Search**

The system search allows a user to pick an elevator configuration to meet his/her building requirements. This system allows the customer to input building characteristics to determine which Otis products meet the customer's building requirements. The system does not recommend a nominal solution as found in the traffic analysis, however it provides a product list to aid the customer with product selection.

### **Hoistway Fitting**

The Hoistway fitting route provides the ability to input existing or planned hoistway dimensions to determine which Otis elevators will fit into the specified elevator shaft. The system then displays all Otis systems that can be constructed within the specified hoistway dimensions.

### **Specifications**

Once the customer has selected an Otis solution product he/she can then view or save specifications for his/her project. These specifications are displayed and stored in Word format. The specifications can either be viewed online or downloaded to the customer's computer for editing. Specifications may vary based upon product type and application.

### **Layouts**

Plan Your Project generates dimensional layouts. These layouts are displayed online using a standard CAD viewer. If an architect uses a CAD software application the layouts generated in Plan Your Project are viewable directly on-line. Otherwise if a customer doesn't have a CAD viewer, Plan Your Project makes a freeware (from Autodesk) Volo viewer available by simply clicking on an icon. Once this viewer is downloaded to the customer's computer he/she can view and download all the layout drawings available through PlanYour Project.

### **Budget Pricing**

Plan Your Project has been developed so a customer can easily obtain a budget price. The budget pricing is generated based upon the Plan Your Project selections and the location of the project.

## Administrative Applications

Plan your Project has a scalable architecture that allows the application to be available in multiple languages with multiple product solutions. Administrative tools are available to approved Otis Personnel through the internal Intranet and are part of a content management application. There are two administrative tools that support Plan Your Project:

1. **PyP Administration Tool** – allows Otis personnel to establish product solutions, country constraints and localized pricing. This tool helps the local countries efficiently load local products, amend to local country code requirements, and provide local regional pricing.
2. **Translation Tool** – allows Otis Personnel the ability to translate tags, text and content into local languages.

## OTIS INVENTION DISCLOSURE

6. **PRIOR KNOWLEDGE:** (Printed articles, patents, products which were available prior to the date of invention and related to the problem solved, how this invention solves the problem or which disclose the invention.)

OtisPlan, LiftPlan

7. **DISCLOSURE OF INVENTION TO OTHERS:**

- A. Date the invention was first conceived:

[REDACTED]

- B. Has the invention been built?

Yes (X)

No ( )

- a. Date Completed

[REDACTED]

- b. Date First Successfully Tested

Plan Your Project has been tested [REDACTED]. Sales associates have been reviewing it since [REDACTED]

- C. Indicate whether any of the following events have occurred relative to the invention and, if so, the earliest date of such occurrence:

- a. Has it been demonstrated to any person?  
(including dealers) outside of the Company?  
Christopher Hahn – NBBJ Architects – N.C.  
Tulu Toros – Clive Davis Architects – N.C.  
Jose Navajas – Clive Davis – N.C.  
William Eagan – Clive Davis – N.C.

Yes   No   Date

(X)   ( )

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M. Ashley Doughton – Clive Davis – N.C.  
Ducan Swift – Crone Assoc. – Sydney Australia  
Nichgolas Back – Crone Associ. – Sydney Australia  
Beta on our web site.

- b. Has it been exhibited at any trade show or exhibition? ( ) (X)
- c. Has it been described orally or in writing to any person outside of the company? (X) ( )  
- Architect presentations  
- Otis.com web site since [REDACTED]
- c. Has it been offered for sale or is it included in any other contract? ( ) (X)
- e. Has it been sold? ( ) (X)  
- Plan Your Project is a free tool to all registered customers using the Internet.
- f. Has it been advertised or otherwise described in any publication? ( ) (X)  
- Plan Your Project has been described in Otis external press releases
- g. Is it planned to release the invention to production? (X) ( )  
- [REDACTED] in the U.K. and France (Beta only)
- h. If the invention is released to production, in what countries will the invention be sold?

This product will not be sold however it is our intent to offer it all countries of the world. The release of Plan Your project immediately follows the release of Otis.com in each country.

- i. Do you believe this invention will be incorporated into the Otis product line? When and in what products?

This product will be incorporated into our e\*Business products. Specifically it is part of our e\*Direct suite of B2B and B2C Internet applications.

- D. If any event listed under Item C above will probably occur in the future, identify the event(s) and estimated date(s):

8. SIGNATURE OF INVENTORS

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Bruce A Powell DATE [REDACTED]  
[Signature] DATE [REDACTED]



\_\_\_\_\_  
DATE \_\_\_\_\_  
\_\_\_\_\_  
DATE \_\_\_\_\_

9. WITNESSED AND UNDERSTOOD

*[Signature]*  
*P. B. Brown*

DATE *[Redacted]*

DATE *[Redacted]*

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